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Marketing Plan Excellence, Inc.

Final Report

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Data Page

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Abbreviations and Acronyms

AMIR	Achievement of Market-Friendly Initiatives and Results Program
BAs	Business associations
COE	Centers of Excellence
EI	Excellence, Inc. or Excellence in Institutional Development
KAAGPT	King Abdullah Award for Government Performance and Transparency
MoAD	Ministry of Administrative Development
NGOs	Non-governmental organizations

Abstract

This report proposes a marketing plan for Excellence, Inc. This includes recommendations on how Excellence, Inc. should structure and pursue marketing efforts and build its initial client base in relevant sectors.

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1. Executive Summary

This document is the initial marketing plan for Excellence in Institutional Development (Excellence, Inc. or EI). It is meant to guide Excellence, Inc. through its initial period of marketing, sales, and growth in the Jordanian market. Sections one through fourteen present overarching marketing issues and themes for EI. Annexes A and B present targeted marketing plans for Excellence, Inc.'s core COE institutional transformation program in initial target sectors – government and business associations.

2. Company Analysis

Vision

Excellence in Institutional Development will become the recognized standard bearer for institutional excellence in Jordan and the Middle East.

Mission

Promote private sector-led economic growth by supporting dynamic public and private organizations to transform themselves into centers of institutional excellence.

Culture

As a new organization, Excellence, Inc.'s internal culture is currently emerging. All efforts are being taken to assure that it is a culture of excellence.

Market Share

Excellence, Inc. currently has no clients and thus no market share. The market for Excellence, Inc.'s primary institutional transformation services was recently created under the Achievement of Market Friendly Initiatives and Results (AMIR) Centers of Excellence (COE) Program. Excellence, Inc. is seeking to fill this new market, and faces little direct competition. However, indirect competition will likely prove strong. Sources of indirect competition are detailed in section six, Market Comparison

3. Service Offerings

Excellence, Inc. will offer a variety of services to support institutions of all types to move up to excellence. Excellence, Inc. (EI) Services are divided into two groups. The first, EI's core offering, is the EI Centers of Excellence (COE) institutional transformation program. The second group of services are EI's advocacy services, a broad offering of individual services that support institutions and sectors to move up to excellence and to play a powerful role in supporting national goals. EI's COE Program and illustrative advocacy services are explained in detail in EI's business plan. COE Program services are also outlined as they pertain to the different core sectors in chapter fifteen of this marketing plan.

4. Potential Clients

Clients for Excellence, Inc. services will include:

- Government and quasi-government institutions
- Business associations (BAs)
- Private sector companies
- Non-governmental organizations (NGOs)
- Media organizations

A description of illustrative advocacy services that Excellence, Inc. will offer, along with the specific markets for which each service offering (or group of services) is available in Excellence, Inc.'s business plan.

The approach to marketing EI's COE Program Services to each of these client groups is detailed in the section fifteen of this plan.

5. Marketing Approach

Initial marketing efforts will focus on building Excellence, Inc.'s COE institutional transformation client base among government institutions. This is the sector for which Excellence, Inc. has the only mature service offerings, including a close relationship with two incentives supporting government agencies to purchase COE services and move up to excellence. These are the King Abdullah Award for Government Performance and Transparency (KAAGPT) and the Ministry of Administrative Development's (MoAD) Challenge Fund.

Subsequent marketing efforts will involve expanding Excellence, Inc.'s COE institutional transformation services among business associations, private sector companies, and (potentially) the media sector. Depending on interest, COE institutional transformation models may also be developed and sold to other specific business sectors, such as pharmaceuticals, services, information technology, etc. COE institutional transformation services will initially serve as the anchor of EI's business, driving marketing and sales efforts.

As demand for COE services begins to stabilize in each sector, Excellence, Inc will package and market an array of advocacy services to supplement its COE institutional transformation services. Advocacy services will focus on bridging the divide between institutions in different sectors and supporting the pursuit of private sector led, public sector facilitated economic growth. Excellence, Inc. will primarily market advocacy services through its COE Program institutional transformation clients. Many advocacy services, while primarily targeted for sale to the private sector, will necessitate willing, active, and broad-based support from public sector institutions. Excellence, Inc. will leverage the relationships and trust it builds carrying out COE Program services in the government sector to support the sale and implementation of advocacy services.

Ultimately, EI will seek to expand regionally and enter markets outside of Jordan. Such expansion is long-term and not covered in this marketing plan. We expect that strategies for regional expansion will be developed and included in subsequent revisions of this plan.

6. Market Comparison

Direct competition

The intellectual capital that makes up Excellence, Inc.'s Centers of Excellence institutional transformation services is understood exclusively by Excellence, Inc. The development of such tools and techniques is time-consuming and cost-prohibitive. Thus, Excellence, Inc. does not initially have any direct competition for its core COE services.

Indirect competition

Indirect competition comes primarily in three forms.

1. *Potential clients opting for no external support.* This is by far the most significant competition. This includes organizations neglecting reform or taking on reform initiatives on their own.

Excellence, Inc. key advantage: numerous: Excellence, Inc.'s institutional transformation program benefits are detailed in the business plan, and in subsequent client-group sections of this marketing plan.

2. *Brand name international management consulting firms*

This group consists of generalist firms who attempt to create and sell solutions to any real or perceived market demand. The threat that this group poses to EI is their ability to leverage their brand names and vast resources to convince potential COE institutional transformation clients that they offer a viable solution.

Excellence, Inc. key advantages: Excellence, Inc. has specific tools and methodologies, and experience using these methodologies, which are unique and not easily replicable. Excellence, Inc. has a better understanding of the primary excellence awards in Jordan, offers broad access to experts in specific fields, and guarantees that clients have the top-level people doing the actual work. Excellence, Inc. also offers a systematic approach and direct access to knowledge existing across client organizations.

3. *Local consulting companies and freelance consultants.*

This group consists of local consulting firms, some of whom already service EI's target market in other areas. They may be able to convince potential clients that they are able to extend their existing work to support institutional transformation needs, or that their work already covers this need sufficiently without necessitating heavy lifting on the part of the client organization.

Excellence, Inc. key advantages: Excellence, Inc. offers a tested methodology, a systematic approach, and a breadth and depth of services unmatched by local consulting firms or

individual consultants. EI also offers the advantage, through its COE methodology, of heightening the internal institutional capacity of the organizations it serves. Finally, EI support can create opportunities for local consulting firms to fill. This alone, if done correctly and well understood by EI's potential competitors, could deter competition against EI's COE institutional transformation services.

7. Keys to Success

1. Operation as an example of excellence. EI's credibility and long-term potential depend on its ability to be an example of the institutional excellence it espouses.
2. Excellence in fulfilling the promise--completely confidential, reliable, trustworthy expertise and information.
3. Ability to develop visibility and generate new business leads. EI must create a recognized and sought after brand that positions EI as a valuable source of support for institutional transformation and improvement.
4. Ability to find and contract highly qualified outside technical expertise to address shared constraints
5. Repeat business. Excellence, Inc. must be built on a solid foundation and create a core group of satisfied, repeat-business clients.
6. Technology. Effective utilization of technology to enhance information sharing, leverage the successes of clients for use by other clients (where appropriate), and to liaise between Excellence, Inc., its clients, and relevant international expertise is a critical element of EI's ability to provide truly transformational support.
7. Effectiveness in creating opportunity and markets for other consulting firms, and in not competing directly against these firms. This necessitates that all EI stakeholders have a thorough understanding of Excellence, Inc.'s core purpose.
8. High profile or brand name clients. Success stories, especially ones from high-profile clients that EI can hold up as examples, are invaluable. They will serve to broaden interest among potential clients, and will support advocacy service sales.

8. Branding

Excellence, Inc. should develop a logo and consistent branding materials. Strong and consistent branding is necessary for EI to establish itself as an example of excellence and a consistent provider of services that support institutional excellence at all levels at all times.

9. Price

Pricing is a crucial issue for Excellence, Inc. EI's Centers of Excellence services should be offered as a package, with limited exceptions.¹ Multiple COE institutional transformation services bought by the same institution will be discounted to reflect Excellence, Inc. cost savings. Grant funds will be used in a measured manner to spur client demand in new markets where necessary. Advocacy services vary widely and should be costed and sold individually. Pricing issues are sensitive to each sector, and are discussed in greater detail in the sector sections of this plan.

10. Promotion

Excellence, Inc. is a delivery-intensive, word-of-mouth, repeat-business business. Direct marketing and word-of-mouth will likely serve as a main channel for Excellence, Inc. marketing and sales. Sponsorship and participation in relevant events, such as appropriate King Abdullah Award functions, should serve as a means to build awareness of EI. EI specialists speaking at industry events, publishing, and being quoted in major trade presses will also serve as a valuable means to promote EI and build EI's brand. Excellence, Inc. should consider using affiliations with its existing clients where appropriate.

One key element regarding EI service promotion is not where to promote them, but when. EI services will need to be promoted in a manner that meets the budget allocation and decision making cycles of its prospective clients. EI will also need to identify the life cycles of the services it offers, adjusting promotional efforts accordingly. Promotional activities specific to each sector are outlined in the sector sections of this marketing plan.

11. Sales Projections

The following sales targets represent number of full-cost COE Program services per sector per year. Numbers are cumulative per sector, and assume a 75% annual client retention rate.

11.1 EI COE Sales Targets

Target Market Forecast						
Potential Customers	Growth	2004	2005	2006	2007	2008
Government institutions		8	10	15	20	
Business associations			2	2	2	
Private sector companies				7	7	
Non-governmental organizations				1	1	
Media Organizations						

¹ Exceptions to consider, as relevant to each sector, are outlined in section fifteen.

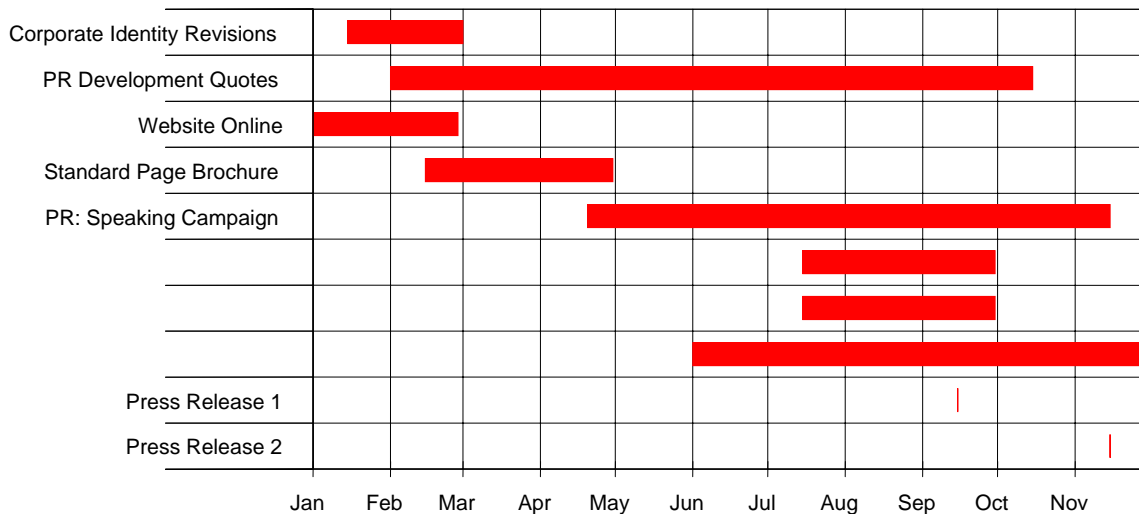
11.2 Advocacy Services Sales Targets

Advocacy services will vary widely in their size, scope, and cost. Operationally, EI is designed so that its COE Program services cover all operational costs. Additional revenue from advocacy services will go towards areas that best advance EI's mission and vision, as determined by the board of directors,.

	2004	2005	2006	2007	2008
Total Revenue: Advocacy Services	2,500	5,000	5,000	7,500	10,000

12. Milestones

Milestones



13. Affiliations and Partnerships

Excellence, Inc. should consider forming partnerships and affiliations with companies and institutions that compliment the services it provides. Partnerships should be based on mutual gain, and should primarily serve to augment EI expertise with sector-specific knowledge and expertise of interest to EI's clients. Partnerships could also be used to support EI's eventual international expansion plans. Potential partners could include:

- 1-QMI for systems related certification and IT security training and certification.
- 2- ICPM for Certified Manager Training
- 3-Excellence in people Ireland-for human capital expertise

4-Excellence One –for the EFQM Model

5- Council for Excellence in Government-for government sector-specific expertise

14. Conclusions

Excellence, Inc. has sufficient opportunity to accomplish its vision and mission, to serve as an invaluable champion of best practices and institutional transformation, and to raise the bar in terms of institutional performance across the sectors in which it works. Conveying and selling this possibility to potential clients is crucial to Excellence, Inc.'s ability to achieve its vision and mission. Marketing Excellence, Inc. effectively is an important step in achieving the organization's overall vision. Initially, marketing should be at the core of EI activity. After entry in each new sector, marketing responsibilities will become engrained in project implementation, allowing Excellence, Inc.'s services, successes, and reputation to speak for themselves. This will reduce the need for cold-call solicitations. The following section outlines marketing approaches to each of the primary sectors that Excellence, Inc. should serve.

Annex A: Government Sector Marketing Plan

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Executive Summary

Government agencies are the initial target market for Excellence in Institutional Development (Excellence, Inc. or EI) Centers of Excellence (COE) institutional transformation services. Carefully constructed marketing plans and approaches are needed to capture this diverse core market. This marketing plan outlines a strategy for EI to follow in marketing its COE services to a broad portfolio of government clients. The unique selling points for enticing government agencies to purchase and participate in the Excellence, Inc. COE program are described in this report. As COE Program benefits for government clients are multi-faceted, and the government decision makers that receive these benefits have different demands, it is crucial that EI develop and deliver a sales pitch that appeals to a broad segment of government agents. Albeit worded differently, this report provides recommendations for Excellence, Inc. in the four 'P's' of marketing: Product, Price, Promotion, and Place. It should serve as a guide for decision making and the creation of targeted marketing approaches for the government sector.

Excellence, Inc. Marketing Strategy

Government agencies successfully participating in Excellence, Inc.'s Centers of Excellence Institutional Transformation Program will ultimately fulfill their mandate in accomplishing His Majesty's vision of turning Jordan into a Center of Excellence. In receiving five-star *certification* from Excellence, Inc., they will establish themselves as Jordanian government trendsetters, set the standard for other government agencies to follow, and serve as powerful facilitators of private sector led economic growth.

1. Excellence, Inc. Techniques and Services Descriptions²

This section uses phraseology directed at prospective clients emphasizing benefits of using Excellence, Inc. services.

1.1 Technique One: Change Guidance

Our Transformation Guidance Experts assist individuals in your government agency through a process of designing, implementing, and monitoring improvements that will transform your organization into one that achieves your vision for optimal organizational performance. Using our Excellence, Inc.'s Five Assessment Criteria in the management disciplines of Leadership, Human Resource Capital, Processes, Knowledge, and Finances, we will work with you and your leaders to assess your association's opportunities to enhance excellence. Fundamental to success is the creation of an Excellence Team within your organization consisting of your members and staff who are guided by our specialists. Your Excellence Team will identify priorities for needed changes and our experts will help you manage institutional transformation to achieve the results you want.

1.2 Technique Two: Strategic Thinking

Create your own future by having our professionals assist in institutionalizing your strategic plan. Strategic thinking and the resultant plan focus on institutionalizing the process through which your association creates, monitors, and updates citizen-centered, results-based, transparent strategic plans that embrace Specific, Measurable, Achievable, Resource-backed, and Time-bound (SMART) goals. Our services also include assisting your association to create an effective, qualitative and quantitative monitoring and evaluation system.

1.3 Technique Three: Benchmarking

Your staff will understand the world's best practices for government performance by using our Benchmark Analyses. We will carry out Benchmarking Analyses in our Five Assessment Criteria. These analyses identify gaps that prevent the achievement of institutional excellence. Carried out by our Expert Assessors by partnering with your Excellence Team, these analyses serve several purposes. They: 1) gauge your association against international best practices; 2) identify your strengths and weaknesses in specific management areas; 3) transfer a heightened understanding of the three pillars of international best practices for government institutions—citizen-centered, results-based, and transparent; and 4) lead your government agency through the certification and the accreditation processes for specific management advances.

1.4 Technique Four: Common Interest Forums

Stop re-inventing the wheel by working with our specialists to form new ideas with your strategic partners. Common Interest Forums bring together Excellence Teams from multiple government agencies on a regular basis to discuss performance improvement ideas. These forums 1) provide an arena for the cross fertilization of concepts from other groups; 2) identify shared opportunities

² This section adapted from the association section of this marketing plan

and constraints; 3) prioritize common association needs; 4) provide support for change implementation; 5) serve as a learning environment for best practices in association management; and 6) provide feedback so you can improve your operations.

1.5 Technique Five: Shared Technical Assistance

Access on-call assistance from specialized experts in areas identified as primary needs of your organization. A major result of our Common Interest Forums will be identifying shared challenges among participating associations. Once identified, Excellence, Inc. will assist multiple clients resolve their problems and take advantage of opportunities by contracting for joint technical assistance. This common approach leverages valuable technical assistance and funding for improvement. It costs nothing extra as it is included in the COE institutional transformation package.

1.6 Technique Six: The Tool Kit

Have the answers to many perplexing management problems at your finger tips, and a guide for how to use best-practice solutions. Excellence, Inc. has built and maintains a Tool Kit of strategies, best practices, case studies, checklists, and training materials to support your Excellence Team in driving internal improvements.

1.7 Technique Seven: On-line Excellence Exchange

Tap into the best ideas and solutions by clicking on our icon.

We at Excellence, Inc. will facilitate information exchange by your participating in our on-line discussion groups. Our Interactive EXI Web Site will provide answers to questions by our experts. In some cases, this will also include participation by recognized international experts. The EXI Web Site will also teach the fundamentals and applications of e-associations.

2. Excellence, Inc. Benefits

Supporting government agencies to transform themselves into Centers of Government Excellence has several major benefits for Excellence, Inc. Several of the government agencies that participate will become examples of excellence that the EI Business Development specialists can use as a salient selling point. Success stories are important in selling such intangible services as are being offered. Another benefit for Excellence, Inc. is that government agencies will market EI services through word-of-mouth with their government colleagues.

A further benefit to EI is that willing participation of a wide range of government actors is necessary for the successful development and sale of Excellence, Inc.'s advocacy services. The relationships and trust that Excellence, Inc. develops with government clients through successful implementation of COE institutional transformation services will be invaluable in this respect.

Finally, government agencies will move beyond a purely business-client relationship to become partners in achieving Excellence, Inc.'s vision. By transforming themselves and embracing a culture of institutional excellence they are directly accomplishing that vision, one institution at a time.

3. Excellence, Inc. Responsibilities

Excellence, Inc. has responsibilities toward its government clients. In addition to conducting COE institutional transformation services for associations including Change Guidance, Strategic Thinking, and Benchmarking, Excellence, Inc. will be responsible for certifying these organizations in the COE criteria.

Certification means that the client organization has scored high enough in one of five Assessment Criteria in the Benchmarking Analysis by the Excellence, Inc. professionals. Full certification means that the government agency has become certified in all five criteria and has become a fully certified, five-star Center of Excellence.

Excellence, Inc.'s responsibility in this area is to maintain a very high standard for COE certification, ensuring that government agencies receiving one or more certification stars have truly achieved the international best-practice standard in the relevant area. Ensuring that organizations receiving COE status truly are Centers of Excellence ensures the integrity of EI's certification.

Another responsibility of Excellence, Inc. is to continually update both the COE benchmarking standard, and the COE tool-kit, to ensure that its clients are receiving state of the art, up-to-date guidance in all institutional reform and government best-practice areas. This is essential for maintaining the Excellent standard to which Excellence, Inc. aspires, and ultimately for the accomplishment of EI's vision.

4. Excellence, Inc. Promotion

In order to gain attention in the public sector marketplace, Excellence, Inc. should conduct a very carefully planned and executed promotion program.

The following are some of the elements and the methods that should be considered.

4.1 Core Message

*A core message should be created and utilized to concisely state what Excellence, Inc. is all about for government clients. **Move Up To Excellence** is a possibility that has been suggested.*

4.2 Sales Points

The following benefits to potential government sector clients should be the focus of EI's COE institutional transformation marketing message and materials aimed at potential government clients.³

1. Ability for organizational leader to catalyze staff at all levels to work powerfully and cohesively towards realizing his/her vision, and to understand and implement international government best practices
2. Fulfill the organization's part of H.M.'s wish for Jordan to become a Center of Excellence
3. Provide citizens and businesses with greatly improved services
4. Increase public trust
5. Become an example of excellence for other government agencies
6. Provide staff access and expert coaching on best practice tools and methodologies; increase employee skills
7. Identify future organizational leaders and improve overall employee job satisfaction
8. Increase scores on the King Abdullah Award for Government Performance
9. Improve effectiveness of work with other government organizations to achieve Jordan's national goals
10. Create a road-map for change through the internal identification of institutional strengths and weaknesses (with EI's comprehensive benchmarking assessment)
11. Potential political gain for organizational leadership
12. Achieve COE certification and other accolades

³ Benefits to government organizations are also presented in the Analysis of Government Agencies section, where they are divided into two focal points: (1) benefits to the head of the organization and (2) benefits to organizational management.

4.3 Marketing Channels and Tools

4.3.1 Channel 1: Direct Mail

Direct mail should be used to make potential government clients aware of Excellence, Inc.'s services.

Direct Mail Tool: Personal Letter from Excellence, Inc. Board or President to government organization.

4.3.2 Channel 2: Personal Contacts

Personal Contacts should occur whenever an organization has expressed interest, or has been identified as a high-potential client by Excellence, Inc. EI's CEO, Business Development Specialist, and/or Technical specialists should attend these sales calls.

Personal Contact Tool: A well developed marketing kit providing broad information on the benefits, costs, and optional packaging of EI's government services. This marketing kit should contain concise, well presented information on COE institutional transformation program, clearly illustrating COE institutional transformation program:

- Benefits
- Success stories
- Pricing options
- Forum start dates
- Articles on COE successes

4.3.3 Channel 3: Public Relations (PR) Campaign

Excellence, Inc. should develop and implement a coordinated and active public relations campaign. Free or inexpensive public relations opportunities should be used whenever possible.

Public relations Tools (PR outlets to be considered):

- Sponsorship of relevant events, conferences
- Public releases highlighting COE client successes, certifications
- Announcements of new members of the Board of Directors
- Support to KAAGPT events
- Series of News Releases on making Jordan institutions competitive in global marketplace
- "What is Excellence?" newspaper column by Majd Abbassi highlighting successes of Jordanian public sector agencies
- Quarterly publication 'The Government Informer'

5. Government Agencies

5.1 Analysis

Excellence, Inc. management and marketing personnel must understand the goals and motivations of government officials. This includes the heads of potential client organizations -- who usually make the purchasing decisions -- and organizational management, whose support is essential to driving successful internal transformation efforts.

Benefits for the head of the government organization:

This is the leader of the organization. Typically, he/she will make the final decision on whether or not to purchase EI's COE institutional transformational services. Often, this individual will serve as the COE institutional transformation program champion.

The organizational head typically wants:

- Political advantage
- Means to impress the minister (or King)
- Prestige
- To win or do well on the King Abdullah Award for Government
- To effectively imprint his/her vision on the organization
- To better support Jordan's social-economic growth
- To gain increased access to expert technical assistance
- To better achieve the organization's mandate
- COE certification
- To improve employee satisfaction, morale
- Validation of his/her excellent leadership
- To show-off the institution's strengths

The organization's management typically wants:

- To improve the organization
- A mandate to fix institutional shortcomings they already know exist
- Recognition
- Higher salaries
- To not be burdened with additional work⁴
- To improve the public good
- To trim bureaucratic constraints
- To learn international government and management best-practices
- To improve employee satisfaction, morale

⁴ This will be difficult as participation on COE teams requires a significant time commitment. Convincing managers that this time is worth the effort is a crucial task.

- To access expert technical assistance
- To win or do well on the King Abdullah Award for Government
- To better achieve the organization's mandate
- COE certification

Matching the benefits of EI's COE institutional transformation program (listed in the Promotion section of this plan) with the goals and the motivations of government officials will be a fundamental marketing challenge of Excellence, Inc. The question of how best to do this should be constantly asked, with the answer driving the development of marketing tools and strategies.

5.2 Packaging

The COE institutional transformation program should be packaged to meet the demands of a diverse government market place. The following are suggestions for packaging COE services to meet the needs of three potential government client groups. EI should regularly gauge interest for the creation of COE services to meet the specific needs of other government sub-groups.

5.2.1 Standard Government COE Package

The standard COE Program package is primarily for individual national level government agencies of small to medium size (50 – 400 employees). This is also applicable for most quasi-government institutions.

5.2.2 Macro Government COE Package

A macro-package should be developed primarily for large national level government agencies, where an organization-wide COE team within the organization is supported by multiple, division-level COE teams. One member of each division level team could be represented on the organization-wide team.

5.2.3 Local government COE Package

Excellence, Inc. may eventually wish to develop and sell COE Program services at the municipality level. Doing so would require development of a COE benchmarking model specific to local government best-practices. This market would require investment in the development of a discrete benchmarking model and should only be considered once EI is ready for horizontal expansion of its COE institutional transformation services.

5.4 Pricing

Excellence, Inc. is built around providing the core service of the COE institutional transformation program. Excellence, Inc. should be able to maintain financial and

operational sustainability if it is able to retain a COE client portfolio of 24 institutions.⁵ Assumptions surrounding this are presented in Excellence, Inc.'s business plan.

5.4.1 Pricing Considerations for the Government Sector

- Jordanian government institutions, by law, are allowed to sole-source procurements under 10,000 JD. Procurements above 10,000 JD must be tendered competitively. This creates a strong incentive for Excellence, Inc. to try and price its COE institutional services under 10,000 JD.
- Excellence, Inc.'s USAID grant included funds for initial price subsidies to spur demand among government clients unfamiliar with relatively new COE services. Excellence, Inc. may wish to use these funds (as sparingly as possible) to price COE services above 10,000 JD while maintaining the bottom line under 10,000 JD, thereby enabling government agencies to sole-source Excellence, Inc. contracts to carry out COE services.
- COE services are intended to be bundled and sold together. Separating them sets a dangerous precedent by allowing government agencies to 'pick and choose' the services they desire without participating in the full transformation process. While in some cases (such as repeat COE clients) this may be acceptable, normally EI should disallow this practice. However, by singling out one or more of the COE bundled services (such as strategic planning assistance or the benchmarking assessments) EI may be able to sell the COE program services in two installments, thereby legally getting around the 10,000 JD sole-source limitation. This decision should be carefully considered by EI.
- Timing is a major factor for government agencies, which must plan well in advance in order to budget for acquiring EI's COE services. EI's marketing plans should understand the government budgeting cycle in order to know when decision-makers plan and make procurement decisions.

5.4.2 Pricing Structures

Standard Government COE Package Price

Excellence, Inc. should consider pricing its standard package, for small to medium sized government or quasi-government entities, 24 institutional clients. For initial clients, EI should consider offering subsidies to reduce the price for government agencies to just below the sole-source maximum.

Macro Government COE Package

Excellence, Inc. should carry out a pricing study to determine the exact cost of delivering COE services to large government organizations. This would entail attaching a cost to the provision of each COE service, deciding on the package of goods and services to be offered at each level of the macro COE package implementation, and deriving a total cost estimate.

⁵ Assumptions surrounding this are outlined in Excellence, Inc.'s business plan.

For example, an institution may choose to have strategic planning support at the top level, or may wish to engage additional EI services for strategic planning assistance in its various divisions. Likewise, an organization wishing for multiple, divisional level benchmarking assessments (a good idea) would need to be charged more than an organization receiving only one organization wide benchmark assessment. This latter option should be discouraged for very large organizations. Pricing COE institutional transformation services for such clients will require a detailed analysis of these costs. This should be an initial focus of EI's marketing team.

Other COE Packages for Government

EI should carry out a detailed cost and feasibility study before adapting COE institutional transformation programs for other government groups. A COE Program for municipalities, for example, would require additional costs for items such as transportation to Amman.

6. Action Plan

6.1 Develop marketing materials

EI's marketing team should develop a set of core brochures that are consistent with EI's branding and image. Brochures should be mixed and matched according to the needs of the potential audience, and should make up a flexible marketing kit that can be adapted to the specific needs of each potential client. Brochures for the marketing kit should include⁶:

- Excellence, Inc. Overview: describing Excellence, Inc.'s vision, governing structure, and core service offerings.
- COE Program: explanation of services and benefits.
- COE Success stories: detailing successful applications and possible results.
- Articles: Already published articles on COE successes.
- Forum start dates, description of topics, technical assistance availability.
- Pricing sheet, options.

6.2 Upcoming Events: Marketing opportunities

Excellence, Inc. should constantly seek out or create relevant events to serve as EI marketing opportunities. This should include the creation of standardized event representation material, such as a table and back-drop. Excellence, Inc. should also seek regular exposure in relevant print publications, and should seek to present at relevant seminars and events. Upcoming events at which EI should create or have a presence include:

- KAAGPT consultants training
- KAAGPT launch

⁶ Some suggested brochures could potentially be combined

- Board of Directors Appointments
- Challenge fund events

6.3 Direct Marketing Campaign

Excellence, Inc. should develop and send out a letter of invitation to potential government clients. This letter should come from Excellence, Inc. CEO Majd Abbassi, perhaps with co-signature of EI's Chairman of the Board. The letter should present EI's credentials and COE service offering, and should inform them that EI will be contacting them to set up a personal, more detailed presentation. EI should track all solicitations sent, following up in a timely manner with a personal meeting and presentation.

Annex B Association Sector Marketing Plan

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1. Executive Summary

Because associations provide unique marketing prospects for Excellence, Inc., carefully constructed marketing plans and approaches are needed. This report contains recommendations on how Excellence, Inc. should take advantage of the opportunity to market their services to and through Jordanian associations.

The unique selling feature for enticing associations to participate in the Excellence, Inc. program is described in this report and suggests that the key element is to provide these groups with an opportunity to derive funds from the process while at the same time receiving the institutional improvement services of Excellence, Inc. This will be done by a sharing of earned revenue from the association's private sector members who will also receive and pay for Excellence, Inc. services.

The associations will become marketing partners with the new company once an association has received certification and accreditation from Excellence, Inc. This plan also outlines Marketing Strategy, describes the techniques and services to be used by Excellence, Inc., and illustrates the benefits and the responsibilities of both the associations and Excellence, Inc. Analyses of the culture and the decision making process of associations are also explained.

1.1 Introduction

Because the AMIR Center of Excellence activities have proven successful at driving reforms in the participating Jordanian government institutions, a decision has been made to expand the program through a new non-profit company, Excellence, Inc. The new company will be funded by USAID and will concentrate on three market sectors to provide institutional development services: 1) government; 2) associations; and 3) private businesses. As institutional reform is a long term process, the need to provide these institutions services beyond the scheduled end of COE Program technical assistance exists, thus the formation of Excellence, Inc.

Associations will become one of the **marketing entrance ways** for Excellence, Inc. into the private sector businesses. These business associations that have received *certification* and *accreditation* from Excellence, Inc. will be allowed to receive a portion of the fees charged to private sector companies for Excellence, Inc.'s services for institutional development.

2. Excellence, Inc. Techniques and Services Descriptions

This section **uses phraseology directed at prospective clients** emphasizing benefits of using Excellence, Inc. services.

2.1 Technique One: Change Guidance

Our Change Guidance Experts assist associations like yours through a process of designing, implementing, and monitoring improvements. Using our Excellence, Inc.'s Five Assessment Criteria in the management disciplines of Leadership, Human Resource Capital, Processes, Knowledge, and Finances, we will work with you and your leaders to assess your association's opportunities to enhance excellence. Fundamental to success is the creation of an Excellence Team within your organization consisting of your members and staff who are guided by our specialists. Your Excellence Team will identify priorities for needed changes and our experts will help you manage institutional transformation to achieve the results you want.

2.2 Technique Two: Strategic Thinking

Create your own future by having our professionals assist in institutionalizing your plan. Strategic thinking and the resultant plan focus on institutionalizing the process through which your association creates, monitors, and updates member-centered, results-based, transparent strategic plans that embrace Specific, Measurable, Achievable, Resource-backed, and Time-bound (SMART) goals. Our services also include assisting your association to create an effective, qualitative, and quantitative monitoring and evaluation system.

2.3 Technique Three: Benchmarking

Install the world's best practices for associations by using our Benchmark Analyses. We will carry out Benchmarking Analyses in our Five Assessment Criteria. These analyses identify gaps that prevent the achievement of institutional excellence. Carried out by our Expert Assessors by partnering with your Excellence Team and our allied accreditation agencies, these analyses serve several purposes. These analyses: 1) gauge your association against international best practices; 2) identify your strengths and weaknesses in specific management areas; 3) transfer a heightened understanding of the three pillars of international best practices for associations — member-centered, results-based, and transparent; and 4) lead your association through the certification and the accreditation processes for specific management advances.

2.4 Technique Four: Common Interest Forums

Stop re-inventing the wheel by working with our specialists to form new ideas with your strategic partners. Common Interest Forums bring together Excellence Teams from other association on a regular basis to discuss performance improvement ideas. These forums 1) provide an arena for the cross fertilization of concepts from other groups; 2) identify shared opportunities and constraints; 3) prioritize common association needs; 4) provide support for change implementation; 5) serve as a learning environment for best practices in association management; and 6) provide feedback so you can improve your operations.

2.5 Technique Five: Shared Technical Assistance

Work with other Jordanian association executives to gain mutual benefits.

A major result of our Common Interest Forums will be identifying shared challenges among participating associations. Once identified, Excellence, Inc. will assist multiple clients resolve their problems and take advantage of opportunities by contracting for joint technical assistance. This common approach leverages valuable technical assistance and funding for improvement.

2.6 Technique Six: The Tool Kit

Have the answers to many perplexing management problems at your finger tips. Excellence, Inc. has built and maintains a Tool Kit of strategies, best practices, case studies, checklists, and training materials to support your Excellence Team in driving internal improvements.

2.7 Technique Seven: On-line Excellence Exchange

Tap into the best ideas and solutions by clicking on our icon.

We at Excellence, Inc. will facilitate information exchange by your participating in our on-line discussion groups. Our Interactive EXI Web Site will provide answers to questions by our experts. The EXI Web Site will also teach the fundamentals and applications of e-associations.

2.8 Service One: Public Policy Advocacy

Help your association by having us rally your members, allies, and strategic partners to advocate policy changes that lower unwanted government barriers for your industry. We at Excellence, Inc. will help identify and research government policies in areas you specify and will serve as a Public Policy Broker using effective strategies and tools for advocating change and improvements. We will access government regulators to provide direct windows into specific government processes and operations. With Excellence, Inc.'s management to ensure your private sector members' requests for policy changes are within acceptable bounds, we can serve as a valuable means for associations to reduce or eliminate government-caused barriers.

2.9 Service Two: Target Task Force Management

Take advantage of your membership growth opportunities and tackle your management problems by having us rally your allies and strategic partners. Through our Target Task Forces built around opportunities and constraints identified in the Common Interest Forums, Excellence, Inc. will solicit funding to implement initiatives that are valuable to all of the Jordanian private sector and its associations. To work effectively, task forces must be managed to ensure results. Coordinating multiple associations and their allies to accomplish shared goals is a service that Excellence, Inc. offers.

3. Excellence, Inc. Benefits

The marketing strategy of using associations as a gateway to the private sector has three major benefits for Excellence, Inc. The associations who participate will become **examples of excellence** that the Business Development specialists can use as a salient selling point. Early in the development of this new company's experience, the management must have specific examples toward which to point. Because only a small fee will be charged to the associations for participation and because of the possibility of receiving non-dues revenue for the groups, these organizations should be relatively easy to "move up to excellence." Success stories are important in selling such intangible services as are being offered.

Another benefit for Excellence Inc is that associations will become **marketing partners** that will be providing the Business Development staff with prospects and marketing communications to a readily available, already segmented market—the association's membership.

These associations can become **partners** with Excellence, Inc. in efforts to advocate **public policy changes** of the Government of Jordan. As the new company matures, more and more opportunities will present themselves to help clients advocate changes in laws and regulations that will help Jordan's economy grow and provide stimulus to improve the average Jordanians' living standards.

4. Excellence, Inc. Responsibilities

Excellence, Inc. has several responsibilities toward association clients. In addition to **conducting the special services** for associations including Change Guidance, Strategic Thinking, and Benchmarking, Excellence, Inc. will be responsible for certifying and accrediting these organizations.

Certification means that the client association has scored high enough in all five Assessment Criteria in the Benchmarking Analysis by the Excellence, Inc. professionals and has earned the Five Star ranking. Upon achieving this ranking, Excellence, Inc. will present the association an Official Document of Certification.

Accreditation means that after receiving the Official Document of Certification, the association's senior staff has taken the Center for International Private Enterprise's **Virtual Business Association Self-Diagnostic** on the Web site www.cipe.org/vba.

The average of the senior staff's scores must be at least seventy-five or above and the scores must be verified by the Excellence, Inc. professional assessor. Upon completing the Self-Diagnostic and the verification, Excellent Inc. will send a letter of verification to the US-based accrediting agency requesting a **Seal of Accreditation** to be added to the Official Document of Certification that the association receives after certification. Upon receipt of the Seal, Excellence, Inc. will present it to the association's board of directors.

5. Excellence, Inc. Promotion

In order to gain attention in the association and the private sector marketplace, Excellence, Inc. should conduct a very carefully planned and executed promotion program. The following are some of the elements and the methods that should be considered.

A core message should be created and utilized that describes the vision of Excellence, Inc.'s leadership. The word message can be used to tell of the company's activities and achievements, or it can argue a particular point-of-view or explain a program. The message is the core meaning, the sum and substance of what an organization is really trying to accomplish, therefore, the company's mission and objectives must be inextricably tied to this message. An example: Move Up To Excellence. This may be a slogan, but it is also a possible core message that should be repeated and repeated.

Money is needed for promotion and administration, so Excellence, Inc.'s budget should set aside a substantial amount for promotion efforts. The program must be professional in nature and that costs money. Slighting the company's promotion budget will only reduce future profits.

Channels of communication should be carefully selected. One channel may be a series of direct mail contacts with personal letters from Excellence, Inc. Board and from the President. These letters should 1) start by explaining the benefits of using Excellence, Inc.; 2) briefly explain the services of the company; and 3) ask for an appointment for the Excellence, Inc. Business Development Specialist, who should follow-up with personal visits to the associations.

A **publicity campaign** should be conducted. For example, a series of events could be undertaken, including an open house for the company's new offices, announcements of the company's new board of directors; and a follow-up of other events such as the meeting with the Government of Jordan ministries and departments. Other events should be created to gain attention among potential clients. Also a series of news stories should be released that tell how excellence in government, associations, and businesses can make Jordan more competitive in the global marketplace.

A regular newspaper **column entitled "What is Excellence"** should be written under the name of Majd Abbassi or the name of the Chair of Excellence, Inc. and sent to newspapers throughout Jordan on a regular basis.

Analysis of Associations

Excellence, Inc. management and business development people must understand the goals and the motivations of associations. What do association executives really want? The answer to that question is additional **non-dues revenues, prestige, and more members**. These executives are struggling to pay salaries, to secure program money, and to cover the

overhead costs for their organization. They do not have discretionary funds. Consequently Excellence, Inc. can be of real assistance by offering these beleaguered executives a new method to increase their cash flow through splitting fees for Excellence, Inc. services purchased by the associations' members.

In addition, association executives are looking for the **prestige** delivered by the Excellence, Inc. Certification and Accreditation certificates. They will use these designations to convince their existing members that their boards and the staffs are doing good jobs. These executives will also use the prestige to convince prospective members to join.

Excellence, Inc. management must also understand the culture of associations. It is a fact-of-life in the association world that the organization is **seldom the top priority** of its membership. Personal business, family, and other time and money requirements place an association down the priority lists of its membership. Most associations have very limited resources. Thus Excellence, Inc.'s program will also not be a top priority of the association executive, even if the executive is convinced that working with Excellence, Inc. will enhance his or her effectiveness in the short term. Leadership demands, programming loads and deadlines, and day-to-day crises will take precedence. Working with associations will be different than working with government departments where the top person directs the staff to comply with the Excellence, Inc. processes.

Association decision processes will also take longer than other types of clients for Excellence, Inc. Association executives will probably have to go through a committee and a board **decision process** that can take an extended amount of time. Seldom will the chief staff officer make a decision to undertake a program such as Excellence, Inc. is offering without consultation from the organization's board of directors and the chair. Thus, quick decisions for participation in the Excellence, Inc. program will be the exception, not the norm.

6. Target Market, Benefits, and Requirements for Associations

Associations have two target markets for helping secure private sector clients for Excellence, Inc. The association's **existing members** are the best major market and secondly, **prospective members** of the association provide a secondary market. By helping their members improve performances, the association can gain additional revenue, secure more prestige, sell more memberships, and become a world-class organization.

In order to participate in the Excellence, Inc. services, the **associations must** do the following:

1. The association must sign a letter of commitment promising to diligently work with the Excellence, Inc. staff on transformational changes.
2. The association must go through Excellence, Inc. Benchmarking Assessment.

3. The association must pay a small one-time enrollment fee.
4. To be eligible for marketing fees, the association must receive Excellence, Inc. Certification in the five criteria.
5. Also the association must receive an Accreditation Seal by scoring 75% on the CIPE Virtual Business Association Diagnostic.

When these requirements are met, the association will have the **right to receive commissions** on all sales that the organization's staff helps generate for Excellence, Inc. services.

7. Association's Marketing Message and Techniques to Members

Like Excellence, Inc., the association must develop a **core message** about the Excellence, Inc. program. A list of benefits for the private sector in the association's sphere of influence should be developed.

The following marketing techniques should be considered:

Stories about the Excellence, Inc. programs should be put in the association's **magazine or newsletters**.

The association executive should write **personal letters** to the association's members requesting appointments for Excellence, Inc. business development specialists.

Also **e-mail messages and e-newsletters** should be used to put the Excellence, Inc. message before the membership of the association.

Excellence, Inc. should be allowed to be a **sponsor** at the association's annual meeting, as well as being allowed to purchase sponsorships at other events of the association.